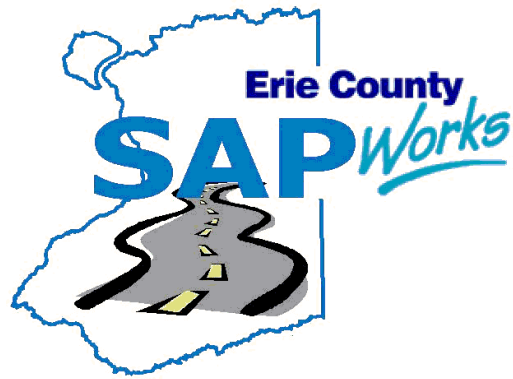
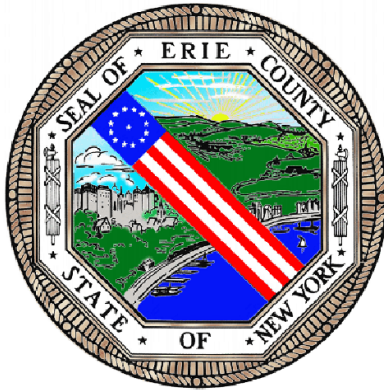




County of Erie



County of Erie

CHANGE MY BENEFITS and PAYMENTS INFORMATION

INTERNAL USE ONLY

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Last Updated: Wednesday, June 29, 2011 at 09:35 AM



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1. Overview

1.1. Purpose

The purpose of this document is to provide instructions to Erie County employees on how to view/update the My Benefits and Payments information in ESS.

1.2. Maintenance

The County of Erie Department of Information & Support Services is the custodian of this document and responsible for its maintenance.

1.3. Revision History

| Revision | Date | Comments |
|----------|----------|---------------------|
| 1.0 | 6/6/2011 | Initial Publication |
| | | |
| | | |
| | | |

2. Background

The County of Erie DISS moved toward the implementation of Employee Self Service (ESS). This system allows employees to enter view and edit their personal information directly into SAP.

3. Role Definitions

| Role | Description |
|-----------|---------------------------|
| Employees | Employees in Erie County. |

4. Ensuring Data Consistency

The previous process for changing this information was accomplished either by notifying the departmental Personnel administrators or personnel department of the changes. Now employees will have the ability to view or change (where permissible) the information themselves by using Employee Self Service.



5. Log on/ Log off ESS system


To update My Benefits/Payment data, the employee must first log on to ESS system. Log on using your User ID and Password, then click on "Log on" button.

Welcome

User ID


Password

Log on



Erie County Employee Self-Service

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Select the "My Benefits and Payments" option.

Welcome Lori Stilwell

Search Advanced Search


Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information


Overview | History | Back

Overview


Welcome to Erie County's Employee Self Service.
This page provides you with access to the services you can utilise to view or change your data. Please follow the instructions in the training videos to accurately changes.
Remember to use Log Off button at the top right when you want to exit from Employee Self Service.




Employee Search
Search for employees by name and find basic information about colleagues.



Working Time
Record your working times, plan your leave, display your time statement, display your daily time swipes.
Quick Links
[Leave Request](#)



My Benefits and Payments
Display Health, Dental, Savings, Flex Plans and other Misc plans that you are enrolled in.
Display your Salary Statement and make changes to W4 withholding.



My Personal Information
Manage your addresses, bank information and information about members and dependents.



From this screen, you can select Participation Overview (in the Benefits Participation area), Salary Statement, or W4 Tax withholding (in the My Payment area). Each selection is covered in the following sections of this manual. To exit this process, select the Logout option at top right corner of this screen.

Welcome Lori Stilwell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

Benefits and Payment | History | Back

My Benefits

Benefits Participation

[Participation Overview](#)

Display your benefit plans and participation details and print a confirmation of all plans if required.

Access the website of benefit providers where available.

My Payment

[Salary Statement](#)

Display your salary statement. Please note that any approved leave or working time changes made on a payroll Monday or Tuesday will only be reflected in the Salary Statement on payroll Wednesday.

[W-4 Tax Withholding](#)

Display or Edit your Federal Tax and New York State Tax withholding information. Please go to www.irs.gov/pub/irs-pdf/fw4.pdf to read instructions on how to determine the number of allowances.



6. Participation Overview

To view Participation Overview, click on "Participation Overview" option under MY Benefits area.

The screenshot shows the Employee Self-Service portal for Lori Stilwell. The top navigation bar includes 'Welcome Lori Stilwell', a search bar, and links for 'Help' and 'Log Out'. Below this is a blue navigation bar with 'Employee Self-Service' and 'Learning' tabs. A secondary navigation bar lists 'Overview', 'Employee Search', 'Working Time', 'My Benefits and Payments', and 'My Personal Information'. The main content area is titled 'Benefits and Payment' and includes a 'History' link. Under the 'My Benefits' section, the 'Benefits Participation' link is circled in red, with a sub-link 'Participation Overview' below it. The 'My Payment' section includes links for 'Salary Statement' and 'W-4 Tax Withholding'.

Welcome Lori Stilwell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

Benefits and Payment | History, Back

My Benefits

Benefits Participation

[Participation Overview](#)

Display your benefit plans and participation details and print a confirmation of all plans if required.
Access the website of benefit providers where available.

My Payment

[Salary Statement](#)

Display your salary statement. Please note that any approved leave or working time changes made on a payroll Monday or Tuesday will only be reflected in the Salary Statement on payroll Wednesday.

[W-4 Tax Withholding](#)

Display or Edit your Federal Tax and New York State Tax withholding information. Please go to www.irs.gov/pub/irs-pdf/fw4.pdf to read instructions on how to determine the number of allowances.



The screen below will display the health plans that you are currently participating in. At this time you cannot make any changes to these plans through this screen. You must use the appropriate Personnel Office procedure if you wish to make changes to your plan participation.

You can view the details of any plan by selecting the plan and then clicking "Show Participation Details" button.

Welcome Lori Stilwell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

Participation Overview | History | Back

Benefits Participation

[Show Benefits General Links](#)

Show Participation Overview as of: 6/2/2011 Go

Participation Overview as of 6/2/2011

| |
|---|
| Plan |
| Dental |
| <input checked="" type="radio"/> GHI Dental GHI Insurance |
| Medical |
| <input type="radio"/> Core Blue Cross Blue Shield |
| 457 Savings |
| <input type="radio"/> EC 457 Plan |
| Retirement |
| <input type="radio"/> NY State Retirement - No Cont. |
| Health Spending |
| <input type="radio"/> Flex Spending - Health Care |
| Parking Pass |
| <input type="radio"/> Parking Pass |
| Show Participation Details |

[Print Confirmation Form - All Plans](#)

Exit



This screen shows the details for the Parking Plan.
By clicking the "Back" button, you can return to the Participation overview screen.

Welcome Lori Stilwell [Help](#) [Lo](#)

[Search](#) [Advanced Search](#)

[Employee Self-Service](#) [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#)

Participation Overview | [History](#) [Be](#)

Benefits Participation

[Show Benefits General Links](#)

Details of Plan Parking Pass

| | |
|-------------------------|-------------------------------------|
| Participation Period | 04/30/2011 - 12/31/2011 |
| Plan Option | Parking Pass |
| Basic Coverage Amount | 0.00 USD |
| Total Coverage Amount | 81.00 USD |
| Employee Cost (Pre-Tax) | 81.00 USD Monthly |
| Deduction Model | EC First/Last Pay period each Month |

[Back](#)



From the Overview screen, you can print a confirmation of all your plans by clicking on the link "Print Confirmation Form-All Plans" at the bottom of the screen.

Welcome Lori Stilwell [Help](#) [Log](#)

[Search](#) [Advanced Search](#)

[Employee Self-Service](#) [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#)

Participation Overview [History](#) [Back](#)

Benefits Participation

[Show Benefits General Links](#)

Show Participation Overview as of: [Go](#)

Participation Overview as of 6/2/2011

| |
|---|
| Plan |
| Dental |
| <input checked="" type="radio"/> GHI Dental GHI Insurance |
| Medical |
| <input type="radio"/> Core Blue Cross Blue Shield |
| 457 Savings |
| <input type="radio"/> EC 457 Plan |
| Retirement |
| <input type="radio"/> NY State Retirement - No Cont. |
| Health Spending |
| <input type="radio"/> Flex Spending - Health Care |
| Parking Pass |
| <input type="radio"/> Parking Pass |

[Show Participation Details](#)

[Print Confirmation Form : All Plans](#)

[Exit](#)



The overview screen allows you to view past plan participation by entering a date and clicking "go". You can view back as far as your date of hire (or the date of SAP's implementation on 4/2/2004), whichever is most recent.

To navigate back to the My Benefits and Payments screen, click the "exit" button.

Welcome Lori Stowell [Help](#) [Log](#)

[Search](#) [Advanced Search](#)

[Employee Self-Service](#) [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#)

Participation Overview [History](#) [Back](#)

Benefits Participation

[Show Benefits General Links](#)

Show Participation Overview as of: [Go](#)

Participation overview as of 8/2/2011

| | |
|--|--|
| Plan | |
| Dental | |
| <input type="radio"/> GHI Dental | GHI Insurance |
| Medical | |
| <input type="radio"/> Core | Blue Cross Blue Shield |
| 457 Savings | |
| <input type="radio"/> EC 457 Plan | |
| Retirement | |
| <input type="radio"/> NY State Retirement - No Cont. | |
| Health Spending | |
| <input type="radio"/> Flex Spending - Health Care | |
| Parking Pass | |
| <input checked="" type="radio"/> Parking Pass | |

[Show Participation Details](#)

[Print Confirmation Form : All Plans](#)

[Exit](#)



7. Salary Statement

To view current or past earning statements, select "Salary Statement".

The screenshot shows the 'Employee Self-Service' portal for Lori Stilwell. The navigation bar includes links for Overview, Employee Search, Working Time, My Benefits and Payments, and My Personal Information. The 'Benefits and Payment' section is active, showing 'My Benefits' and 'My Payment' options. The 'Salary Statement' link under 'My Payment' is circled in red.

Welcome Lori Stilwell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

Benefits and Payment | History | Back

Benefits and Payment

My Benefits

Benefits Participation

[Participation Overview](#)

Display your benefit plans and participation details and print a confirmation of all plans if required.

Access the website of benefit providers where available.

My Payment

Salary Statement

Display your salary statement. Please note that any approved leave or working time changes made on a payroll Monday or Tuesday will only be reflected in the Salary Statement on payroll Wednesday.

[W-4 Tax Withholding](#)

Display or Edit your Federal Tax and New York State Tax withholding information. Please go to www.irs.gov/pub/irs-pdf/tw4.pdf to read instructions on how to determine the number of allowances.



You will see screen below. You can view the current and past statements that you have received back to you date of hire (or 4/2/2004) whichever is most recent. You can navigate to previous statements using the "Previous Salary Statement" button, or navigate forward again by using the "Next Salary Statement" button. For any statement you view, you can print by selecting the printer button. The Exit button will take you back to the My Benefits screen.

NOTE THAT ANY TIME APPROVED ON A MONDAY AND TUESDAY OF A PAY WEEK WILL GET DISPLAYED IN THE SALARY STATEMENT RELEVANT TO THAT PAY WEEK ONLY ON WEDNESDAY.

Employee Self-Service | Learning | Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

Salary Statement | History | Back

Paycheck Inquiry Service

Show Overview

Previous Salary Statement | Next Salary Statement | Exit

Employee Name: Trainer ES | Personnel No: 8697 | Pay Period Dates: 04/09/2011 - 04/23/2011

| EARNINGS | | | | |
|-------------------------|--------|--------|----------|--------|
| | RATE | NUMBER | CURRENT | YTD |
| Regular Hours | 28.919 | 42.56 | 1,242.36 | 16,995 |
| Holiday Pay | 28.919 | 8.00 | 231.35 | 1,156 |
| Vacation | 28.919 | 8.00 | 231.35 | 1,098 |
| Sick | 28.919 | 19.00 | 549.46 | 1,006 |
| Personal Leave | 28.919 | 1.00 | 28.92 | 113 |
| Comp Time Taken | | | | 122 |
| PMLA Sick | 28.919 | 0.97 | 28.05 | 172 |
| Cancer Screening | | | | 115 |
| Unauthorized Leave Unpa | | 0.07 | 0.00 | |



You can click on the "Show overview" button to navigate more broadly. You will use the drop down next to "Display the last" and select "all available statements".

Welcome Lori Stilwell [Help](#) [Log](#)

[Search](#) [Advanced Search](#)

Employee Self-Service [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#)

Salary Statement [History](#) [Back](#)

Paycheck Inquiry Service

[Hide Overview](#)

Display the Last: All Available Sal. Statements

| Payment Date | Gross | Payment Amount | Print Status |
|--------------|--------------|----------------|----------------------|
| 04/29/2011 | 2,311.49 USD | 1,535.47 USD | Vorgemerkt für Druck |
| | | | |
| | | | |

[Previous Salary Statement](#) [Next Salary Statement](#) [Exit](#)

Employee Name: Trainer ESS Personnel No: 8697 Pay Period Dates: 04/09/2011 - 04/2

EARNINGS



You will now see the screen below showing a list of all available statements. You can use the navigation tool at the bottom of the frame to find the statement you want to view. Once you find it, click on it, and it will be shown in the lower part of the screen. You can click to print or save icons here. It is not recommended to save the statement if you access ESS on a shared computer.

Click on the Exit button to navigate back to My Benefits/Payment screen.

Welcome Lori Stilwell [Help](#) [Log](#)

[Search](#) [Advanced Search](#)

Employee Self-Service [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#)

Salary Statement [History](#) [Back](#)

Paycheck Inquiry Service

[Hide Overview](#)

Display the Last: [All Available Sal. Statements](#)

| Payment Date | Gross | Payment Amount | Print Status |
|--------------|--------------|----------------|--------------|
| 07/02/2004 | 2,125.74 USD | 1,353.85 USD | |
| 06/18/2004 | 1,878.32 USD | 1,224.81 USD | |
| 06/04/2004 | 1,863.53 USD | 1,206.93 USD | |
| 05/21/2004 | 1,878.33 USD | 1,215.87 USD | |
| 05/07/2004 | 1,878.32 USD | 1,215.87 USD | |

Row 180 of 184

[Previous Salary Statement](#) [Next Salary Statement](#) [Exit](#)

Employee Name: Trainer ESS Personnel No: 8697 Pay Period Dates: 04/09/2011 - 04/2

EARNINGS



8. W4 Tax Withholding

To view or change W4 tax withholding information, click on the "W4 Tax Withholding" option.

Welcome Lori Stilwell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

Benefits and Payment | History, Back

My Benefits

Benefits Participation

[Participation Overview](#)

Display your benefit plans and participation details and print a confirmation of all plans if required.

Access the website of benefit providers where available.

My Payment

[Salary Statement](#)

Display your salary statement. Please note that any approved leave or working time changes made on a payroll Monday or Tuesday will only be reflected in the Salary Statement on payroll Wednesday.

W4 Tax Withholding

Display or Edit your Federal Tax and New York State Tax withholding information. Please go to www.irs.gov/pub/irs-pdf/fw4.pdf to read instructions on how to determine the number of allowances.



Here you can view your current W4 information. If you wish to make changes, click the "Edit" button under the item you wish to change.

Welcome Lori Stowell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

W-4 Tax Withholding | History | Back

W4

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Federal

Filing Status: Single
No. of Exemptions: 00
Edit

New York

Filing Status: Single
No. of Exemptions: 00
Edit

Previous Step Exit

Here you can change your filing status, number of exemptions, exemption status, and additional withholding amounts. Please refer to Form W4 at www.irs.gov for instructions about how to arrive at the proper filing status and exemptions.

Welcome Lori Stowell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

W-4 Tax Withholding | History | Back

W4

1 Overview 2 Edit 3 Review and Save 4 Confirmation

New York

Tax Authority: NY
Filing Status: Single
No. of Exemptions: 00
Additional Withholding: 0.00 USD
Tax Exempt Indicator: Not exempt

Declaration

☐ Declaration
Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate or entitled to claim exemptions.

☒ Valid from Today
☐ Valid from

Previous Step Review Exit



When you have changed any data on this screen, you should read the declaration. If you are ready to make the changes, check the "Declaration" Box to agree to the statement. You then need to decide when you wish the changes to take effect. It could be effective today, or at some date in the future. Look over the information again and, if it is accurate, click on the "Review" button.

Welcome Lori Stilwell [Help](#) [Log](#)

[Search](#) [Advanced Search](#)

Employee Self-Service [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#)

W-4 Tax Withholding [History](#) [Back](#)

W4

1 Overview 2 **Edit** 3 Review and Save 4 Confirmation

New York

Tax Authority: NY

Filing Status: Single

No. of Exemptions: 00

Additional Withholding: 50.00 USD

Tax Exempt Indicator: Not exempt

Declaration

☒ Declaration

[Declaration Checklist](#) of perjury I certify that I am entitled to the number of withholding allowances claimed on this certificate or entitled to claim exemption

☐ Valid from Today

☐ Valid from

[Previous Step](#) [Review](#) [Exit](#)

After reviewing the data, you can select "Save" to update the information.

Welcome Lori Stilwell [Help](#) [Log](#)

[Search](#) [Advanced Search](#)

Employee Self-Service [Learning](#)

[Overview](#) | [Employee Search](#) | [Working Time](#) | [My Benefits and Payments](#) | [My Personal Information](#)

W-4 Tax Withholding [History](#) [Back](#)

W4

1 Overview 2 Edit 3 **Review and Save** 4 Confirmation

Verify the Tax Data data below

New York

Tax Authority: NY

Filing Status: Single

No. of Exemptions: 00

Additional Withholding: 50.00 USD

Tax Exempt Indicator: Not exempt

Valid from 7/1/2011

[Previous Step](#) [Save](#) [Exit](#)



You will then see the confirmation screen that indicates the "The changes you made to your Tax Data data were saved".

From here you decide where to go next.

For this example, we will click on "W4 tax withholding overview".

Welcome Lori Stillewell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

W-4 Tax Withholding | History | Back

W4

1 Overview 2 Edit 3 Review and Save 4 Confirmation

The changes you made to your Tax Data data were saved

What do you want to do next?

[Go to W4 Tax Withholding Overview](#)

[Go to My Benefits and Payments homepage](#)

[Go to Employee Self-Services homepage](#)

New York

Tax Authority: NY

Filing Status: Single

No. of Exemptions: 00

Additional Withholding: 50.00 USD

Tax Exempt Indicator: Not exempt

Valid from 7/1/2011

You will see screen below. There is now a "Delete" button in addition to the "edit" button now. You can delete any change you just made, until the end of the day that the change is scheduled to take effect.

To navigate back to My Benefits and payments, click the "Exit" button here.

Welcome Lori Stillewell

Search Advanced Search

Employee Self-Service Learning

Overview | Employee Search | Working Time | My Benefits and Payments | My Personal Information

W-4 Tax Withholding | History | Back

W4

1 Overview 2 Edit 3 Review and Save 4 Confirmation

Federal

Filing Status: Single

No. of Exemptions: 00

Edit

New York

Valid until 5/30/2011

Filing Status: Single

No. of Exemptions: 00

Edit

Valid from 7/1/2011

Filing Status: Single

No. of Exemptions: 00

Edit Delete

Previous Step Exit

If you have any difficulty accessing any service please call helpdesk at 858-6715.